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Beverage Industry
AN HBJ PUBLICATION
APRIL 1985

...igs for Pepsi in a new TV spot, at left, while Coke opts for a wide cross-section of American musical tastes in its new "Coke is it" spots.

Cans, PET lead packaging gains

SPECIAL REPORT—Cans led the way in packaging gains in 1984, up 9.6% in soft drinks and 3.8% in beer, according to just-released figures from Prescott, Ball and Turben market analyst Arthur M. Stupay.

Total packaged volume closely paralleled the fortunes of the soft drink and beer industries; packaged soft drinks increased 4.5% and packaged beer dropped 1.2%, based on Stupay's figures which reflect packaging in units of 12-oz. container equivalents.

Along with cans, PET showed strong gains, up 7.7% in soft drinks, but it's apparent the gains of both PET and cans came at the expense of glass. In soft drinks, one-way glass was up .8% while returnables were down 4.8%. Losses were even more dramatic in beer with one-ways down 13.7% and returnables off 5.6%.

In soft drinks, while the packaged segment grew, it did not outpace the industry. Stupay reports packaged sales dropped from 76.4% of total soft drinks sold in 1983 to 76% last year. He predicts it will further drop to 75.6% in '85.

(Continued on page 30)

SECONDARY PACKAGING
PAGE 4

Coke opens new front; Pepsi goes super-celeb

Media hype fans Ferraro, Ritchie debut

by Paul E. Mullins
Editor

NEWS ANALYSIS—If Pepsi has proven anything in the last two years, it is that the firm can produce ad campaigns which make the news: the evening news, the morning news, the talk show news, the late night news, the newspapers and the weekly news publications.

Within hours after the Lionel Ritchie spots were previewed by bottlers in Los Angeles, the electronic and print media reported on the new campaign. Even after the main brand commercials aired in a three-minute spot which company executives called a "Megablock" on the Grammy telecast, the media coverage continued.

MTV treated the new spots as a major music news event and aired them in a special telecast the next evening.

Just as newsworthy were the new Diet Pepsi spots. The debut of former vp-candidate Geraldine Ferraro created a controversial barrage that topped even the earlier Lionel Ritchie events.

The controversy was over whether or not Ferraro had sold out to act as spokesperson

(Continued on page 38)

7UP REVIVES UNCOLA
PAGE 4

Cherry Coke: new segment or 'Dr' clone

by Gary A. Hemphill
Managing Editor

NEWS ANALYSIS—Coke stole a little of Pepsi's thunder and opened up what it described as a new sugared beverage category with the introduction of cherry Coke just days before Pepsi bottlers met in Los Angeles.

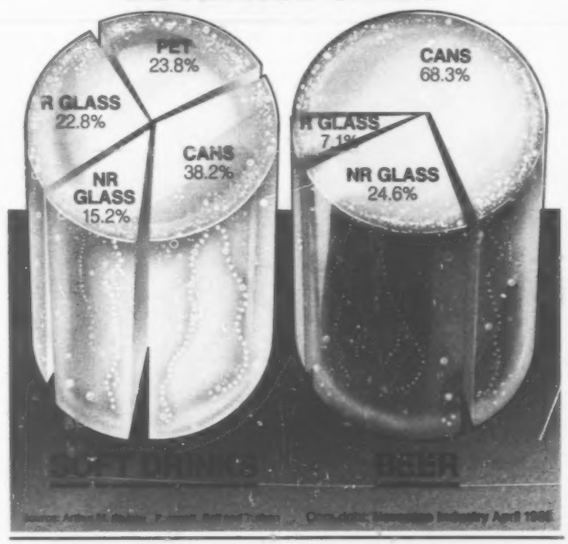
In spite of protests to the contrary, most consumer media compared the taste of the product to Dr Pepper and speculated on the probable positioning.

The new entry opens up a slew of questions:

- Will Coke/Dr Pepper bottlers want to also bottle cherry Coke?
- Will Dr Pepper attempt to prevent Coke/Dr Pepper bottlers from also bottling cherry Coke?
- Is cherry Coke an emerging new soft drink segment, as

(Continued on page 39)

1984 PACKAGED BEVERAGE SALES



BI Today

'Grabber' adds strength

Mead Packaging has introduced the Grabber handle for 24-can packs. The handle strengthens the package, allowing for a reduction in fiberboard pt. size and a cost savings. See page 22.

Congress expected to okay saccharin for another year

by Marty Westerman
Contributing editor

WASHINGTON, DC—Congress will renew the saccharin moratorium for at least another year, Capitol Hill sources tell BI. The current extension expires April 22, and the debate over the low-calorie sweetener is once again in the limelight.

Industry saccharin producers and users want another three years, but Senate Labor and Human Resources Committee member Howard Metzenbaum (D-OH) wants to hold hearings first.

While identically-worded moratorium-extension bills were introduced in February in the House by Tom Foley (D-WA) and in the Senate by Orrin Hatch (R-UT) and Edward Kennedy (D-MA), Sen. Metzenbaum continued to call for hearings. To assure market stability, however, he agreed

(Continued on page 28)

BI Report

■ CANADA DRY, SUNKIST, both owned by R. J. Reynolds, will consolidate their operations in Atlanta at the current address of Sunkist, 2600 Century Pkwy., Atlanta, GA 30345. Fran Mullen, formerly president of Canada Dry will be president of the newly-formed Del Monte Franchise Bev-

(Continued on page 76)

Beverage Industry
AN HBJ PUBLICATION

New Uncola launch 7UP's 'biggest ever'

by Paul E. Mullins
Editor

NEWS ANALYSIS—It could have been the late '60s all over again as Seven-Up rolled out its new Uncola ad campaign at a series of regional bottler meetings around the country recently. The primary difference was new faces in charge and new faces in the audience.

Geoffrey Holder revives the Uncola campaign.

The other difference was that this time the audience was not as dumbfounded as when Orville Roesch, then vp-marketing, did the unveiling back in 1968. There were no shuffling feet or under-the-breath expressions of doubt about the concept.

There was genuine pleasure in the return to the Uncola and for the implementation.

Make no mistake about it though, this is not a "pick me up, polish me off" return to the Uncola.

Gone are the Peter Max graphics and the butterfly posters of yesterday. Retained are spokesman Geoffrey Holder and the Uncola glass.

The "sell" also is not as subtle as some of the early Uncola gimmicks. Holder is a salesman and he sells. His pitch includes the "no caffeine, no artificial flavors, no artificial colors and he adds a "no artificial preservatives" message in some commercials. He is featured in seven of the nine new TV spots and concludes each with "The Un's the One" and tops it off with a drawn out "Ahhhhhhhhh!."

Largest ever

The nine new television commercials and six new radio spots which the firm revealed to bottlers in late February at a series of regional meetings are the most Seven-Up has launched at one time. They were scheduled to be aired during a five-week period beginning in early March.

Although company officials declined to give a figure,

(Continued on page 26)

Secondary/tertiary packaging

Paper, plastic battle it out

SPECIAL REPORT—And the big winner in this year's struggle between plastic and paperboard is whoever is buying secondary and tertiary packaging. In other words, soft drink packers and brewers.

Although shrink film still has not made a measurable dent as a secondary packaging material for either bottles or cans, the threat was enough to spark a flurry of activity by the paperboard manufacturers.

The president of a potentially major supplier of film to the industry told BI recently that "if it weren't for us, the industry would not have these low-cost paperboard choices."

He's right. The bare facts are that an integrated paperboard packaging producer which owns mills as well as converting equipment has no interest in reducing the amount of paperboard tonnage the firm moves.

As a result, 28 pt. board is being replaced with 21 pt. board and 18 pt. looks like it will shortly also make inroads. Each reduction of one point can mean as much as a $1 reduction in price per thousand wraps.

For large producers such as a brewery or multi-plant purchasing group, these savings can mean big bucks. The reductions also mean that paperboard can compete on a price basis with shrink film.

Last year was still too early to see what kind of inroads plastic film will make into the secondary packaging for both beer and soft drinks. The big news was the continued expansion of can 12-packs in both industries.

Beverage Industry estimates that paperboard's share of packaged can soft drinks has risen to 13.8%, up almost three share points over 1983. Credit, say suppliers, goes to wide use of this package as a promotional tool in the marketplace.

Because the 12-pack is growing and its market share expanding, plastic-packaged goods lost market share slightly, dropping to 76.2% of the total canned soft drink gallonage.

Paperboard increased its share in PET due primarily to its use as a wrap for the 2-L size. Bottlers used two-packs of these containers to compete with 3-L intros by competition in a number of major markets.

The non-returnable bottle market is turning more and

(Continued on page 35)

PACKAGED SOFT DRINK GALLONAGE

	Loose	Paperboard	Plastic
Cans	10%	13.8%	76.2%
PET	96.3%	3.8%	—
NR glass	12%	87%	—
R glass	10%	45%	45%

PACKAGED BEER BARRELAGE

	Corrugated	Paperboard	Plastic
Cans	6.2%	39.8%	54%
NR glass	13%	87%	—
R glass	89%	11%	—

Copyright: Beverage Industry April 1985

In Congressional hearings. . .

Alcohol ad ban flounders; no link to abuse proven

by Marty Westerman
Contributing Editor

WASHINGTON, DC—From all indications, the alcoholic beverage industry won the first round in the open Congressional debate on banning beer and wine ads on television.

As a result, Congress may table the matter, which will put the federal government on record as saying there is no link between ads and alcohol abuse. It may also refer the matter to BATF for further study, or say this is a regulatory matter, which also leaves it to BATF and FTC.

The no-ban eventuality became clear at mid-February hearings before the Subcommittee on Alcohol and Drug Abuse, chaired by Sen. Paula Hawkins (R-FL). Pro-ban and anti-ban witnesses agreed there is no study which conclusively links ads to increased drinking, alcohol abuse, or a significant incidence of law violations.

Hearings and conver

(Continued on page 24)

2-L cooler tackles on-premise market

CANANDAIGUA, NY—Sun Country wine cooler, produced by Canandaigua Wine Co., is the first cooler available in 2-L PET bottles.

The new package was rolled out March 1 and the company plans to complete its market introduction by April 15.

The package concept resulted from a joint effort involving Canandaigua Wine Co. and Owens-Illinois to expand on the success of Sun Country Cooler. In seven months, this white wine and fruit juice cooler has stepped up to be the second leading brand in the country, according to *Newsweek Magazine*.

The new 2-L is a pre-labeled emerald green bottle, topped by a green pre-threaded Owens-Illinois Plas-Top plastic closure. According to an O-I spokesperson, the resin is supplied by Eastman Chemical, and the base cup by Gulf Chemical.

National distribution of the 2-L package is planned for retail food supermarkets, convenience stores, liquor and wine stores, hotels, restaurants and concession operations.

(Continued on page 25)

Sun Country Cooler, the first wine cooler in a 2-L PET bottle, is targeted at both the retail and on-premise markets.

Features

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page 56

10 **SD vending sales up 20%-25%**
The vending future is in diversification with vending programs including aseptic venders, versatile multi-pack units and bulk water machines.

15 **Long-shot pays off**
Expected to fail when first started, Great Lakes Canning shines because of company dedication and President John Bitzer's belief in taking chances

23 **IEFP pre-show events**
BI's roundup of the exposition reviews some of the technology presented including Continental's liquid nitrogen system.

48 **A fountain stalemate?**
Pros and cons of both bag-in-box and transfer tank dispensing equipment are presented in BI's annual fountain report, and this year the atmosphere is electric.

56 **Combibloc under new command**
In an exclusive Beverage Industry interview, new Combibloc president James C. Cole voices his thoughts on the future of aseptics.

62 **50 years ago. . .**
American Can Co's David Wiesley talks about the future outlook for the metal can and addresses its progress over the last 50 years.

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Soundoff

An invitation to the FTC

". . . Each of these bottlers with huge territories of distribution could provide the capability for large major chains with numerous outlets — all within the new large franchise territory — to transfer merchandise at will into areas that may be serviced by several adjacent 7UP bottlers. . . perhaps even facilitate warehouse deliveries without any violation of franchise transshipment limitations and probably at a lower delivery cost to the bottler.

"Combine this with exclusive regional CMA's and you have the potential for a monopolistic position. This restraint of trade is certainly not in keeping with the spirit and intent behind the passage of the Interbrand Competition Act.

"In the long term, this will invite law makers — and probably the FTC — to examine the industry and perhaps pass laws which will be more restrictive and more oppressive. We'll all be the losers."

Edward Frantel
president
Seven-Up Co.

In these excerpts from Frantel's speech at the firm's recent bottler meetings, he was talking about the formation of large Coca-Cola complexes on the East Coast.

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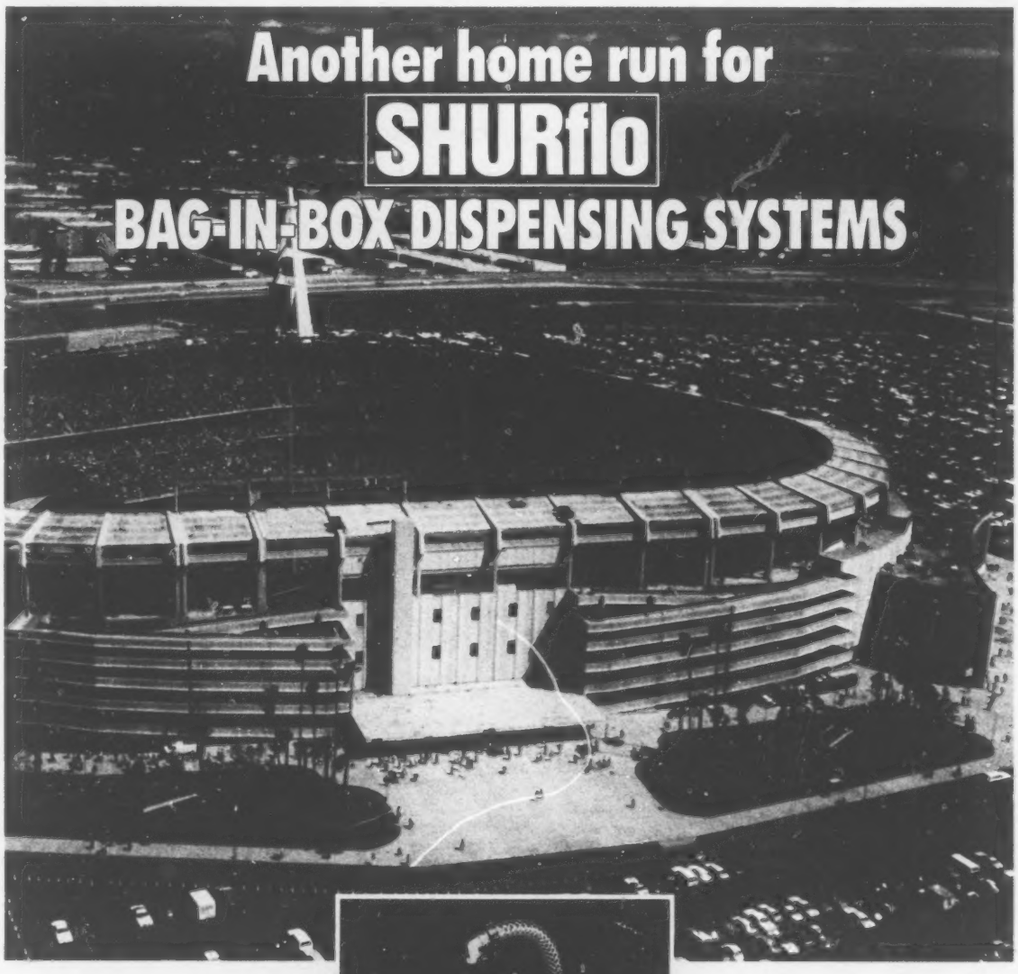
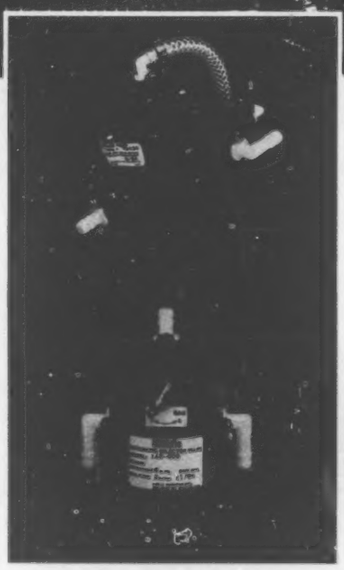




Only one Bag-in-Box dispensing system has the experience to make it into the major leagues. SHURflo's dispensing system provides California Angel fans with a steady supply of baseball favorites. No matter what your flavor, SHURflo keeps the beverages pouring as the innings wind down.

Anaheim's Angel Stadium is another example of SHURflo's leadership in B.I.B. dispensing. A lineup of SHURflo all-stars highlights a winning dispensing system:

- The Diaphragm Gas Pump—the clutch player provides constant flow to single or multiple dispensing head unit.
- The Automatic Selector Valve—a consistent starter that gives Angel fans a steady supply of refreshing soda.

SHURflo's beverage dispensing strength and power produces a B.I.B. system worthy of Angels.

Serving an average of 30,000 people every game is a major league challenge. In beverage dispensing, you need a company that plays hardball. A winning company like SHURflo.

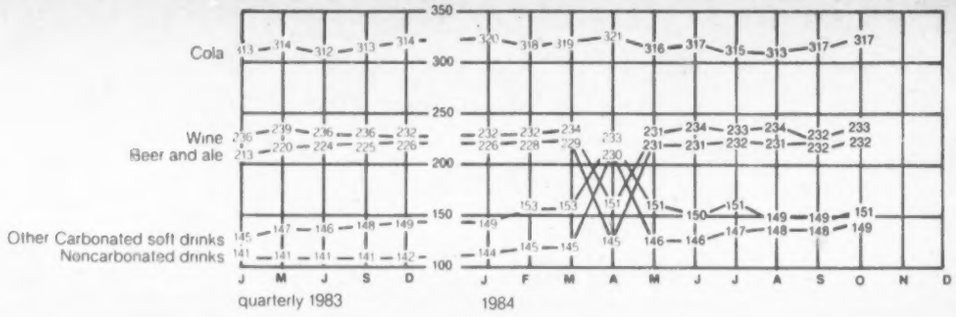
SHURflo
The Leader.

1400 Cerritos Avenue East, Anaheim, CA 92805
(714) 533-7700 or (800) 854-3218
Telex Number: 910-5912707 SHURflo ANH

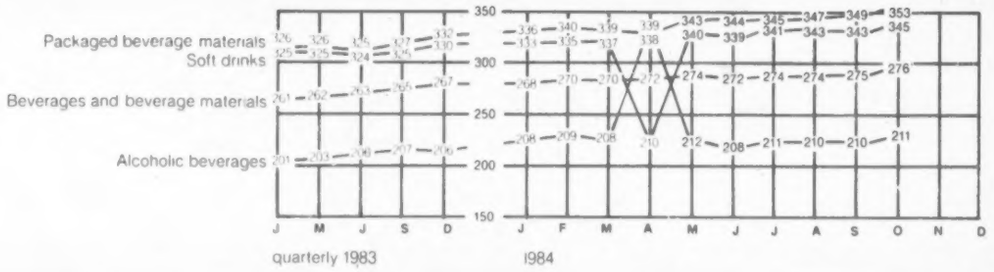
Circle No. 158 on Reader Service Card

Beverage Business Indicators

1984 CONSUMER PRICE INDEX (1967 = 100)

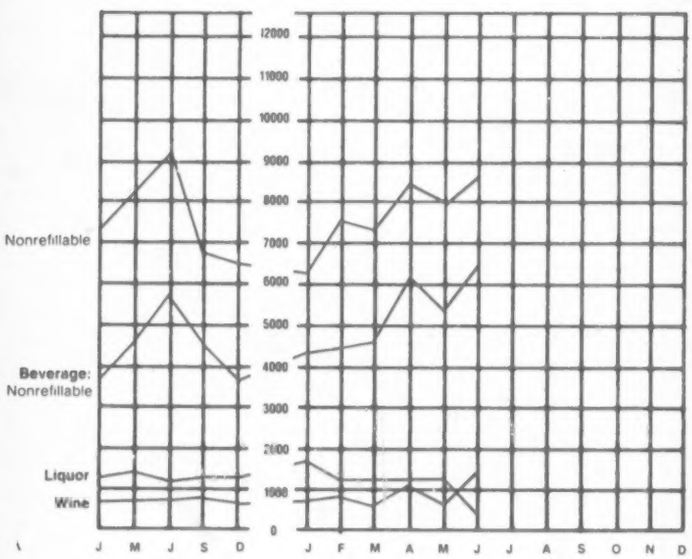


1984 PRODUCER PRICE INDEX (1967 = 100)



BOTTLE SHIPMENTS

(thousands of gross)



IMPORTED BEVERAGES

(proof gals)

	Sept. 1984	Oct. 1984	% Change	Oct. 1983	Oct. '83 vs. Oct. '84 % Change
Beer*	23,497,170	18,850,576	(19.8)	17,320,101	8.8
Whiskey	5,946,188	6,944,850	16.8	11,264,760	(38.3)
Brandy	528,355	657,735	24.5	612,445	7.4
Gin	546,481	605,329	10.8	698,019	(13.3)
Rum	177,976	140,788	(20.9)	135,705	3.7
Cordials & liqueurs	819,489	856,792	4.6	946,621	(9.5)
Others	959,505	975,613	1.7	1,350,984	(27.8)
Total	32,475,164	29,031,683	(10.6)	32,328,633	(10.2)
Sparkling wines	1,291,506	1,530,961	18.5	1,209,466	26.6
Still wines, table	10,464,515	9,350,570	(10.6)	10,179,594	(8.1)
Still wines, fortified	231,329	380,022	64.3	267,530	42.0
Vermouth	240,982	264,917	9.9	278,476	(4.9)

*Includes ale, stout, porter
Source: National Association of Beverage Importers

ALCOHOLIC BEVERAGE REMOVALS

(barrels of 31 gals)

	Aug. 1984	Sept. 1984	% Change	Sept. 1983	Sept. '83 vs. Sept. '84 % Change
Beer	17,609,867	13,842,430	(21.4)	15,049,484	(8.0)
Wine*	30,865,267	29,784,891	(3.5)	32,739,034	(9.0)
Spirits*	30,251,655	26,971,337	(10.8)	32,982,911	(18.2)

*wine gals
Source: U.S. Department of the Treasury Bureau of Alcohol, Tobacco and Firearms

CLOSURES FOR BEVERAGES

(thousands of gross)

	July 1984	Aug. 1984	% Change	Aug. 1983	Aug. '83 vs. Aug. '84 % Change
Metal (for spirits, wines)*	62,954	80,048	27.2	75,945	5.4
Plastic (for spirits, wines)*	92,331	112,183	21.5	135,002	(16.9)
Metal Crowns (beer & soft drinks)	13,518	14,712	8.8	15,135	(2.8)
Soft drink (convenience and conventional)	5,722	5,115	(10.6)	5,591	(8.5)
Beer (convenience and conventional)	7,796	9,597	23.1	9,544	0.6
All other metal closures other than crowns	9,242	8,392	(9.2)	9,023	(7.0)

*thousands of units
Source: U.S. Department of Commerce Bureau of the Census

Compiled by Market Data Communications (MDC) for Beverage Industry

Cans, PET lead packaging gains in '84

(Continued from page 1)

In beer, the story was different. Packaged sales dropped at the same rate of total beer sold, both off 1.2%. Therefore, the percent of packaged sales versus total volume remained the same, 86.9%, and Stupay predicts it will go unchanged again in '85.

Soft drinks

Cans were without a doubt the story of the year in the soft drink industry. Consumers purchased nearly 10% more soft drinks in cans in '84 than they did in 1983.

Stupay points to the increasing use of aluminum primarily because of its recyclability. The Aluminum Assn. reports 56.3% of all aluminum cans shipped in 1984 were recycled.

In addition, Stupay says 99% of all beer cans and 85% of all soft drink cans in 1984 were aluminum. The remainder was steel. Steel soft drink cans were off 14% and steel beer cans were off 35%.

Despite this, the steel industry made lots of noise in 1984 about a comeback. A 1984 study commissioned by the American Iron and Steel Institute and conducted by Arthur D. Little Inc., a research firm, concluded that all-steel cans and bi-metallic cans (steel body and aluminum lid) are more energy efficient than all-aluminum cans.

In addition, Stupay believes a comeback by steel would avoid an aluminum monopoly. "If aluminum has a monopoly, they might be able to charge monopoly prices," he reasons.

The bottom line, Stupay reports, is that tin-plate cans have little recycling value. "Some comeback can be expected, but I don't look for the steel can to be an important package," he adds.

While cans had a good year, PET may have been the most innovative package with the introduction of the 3-L, and reports that the 4-L is not far off. In addition, Coca-Cola U.S.A. was expected to put the plastic can into test markets shortly.

Up 7.7% in 1984, PET is expected to grow in the soft drink industry. The 2-L still holds the bulk of this segment, but that is slowly changing. In terms of units, Bob Harris, senior market research analyst, Eastman Chemical, has compiled these numbers for PET:

- .5-L up to .9 billion in '84 from .5 billion in '83, an 80% increase;
- 1-L up to .5 billion in '84 from .4 billion in '83, up 25%;
- 2-L up to 3.2 billion in '84 from 3 billion in '83, up 6.7%;
- 3-L at .1 billion in '84, its first year in the market.

Stupay's .5-L numbers differ somewhat, but both Harris and Stupay expect the package to increase in the future. "Plastics have begun to boom in the .5-L," says Stupay. He estimates 1.5 billion units went into the market last year, a 40%-plus increase over 1983.

"Those who claimed that the .5-L was dead have been proven wrong. It continues to grow dramatically, but it hasn't provided dramatic profit growth because of over-capacity," he says.

PET expert Len Ryder of Ryder Associates sees some bottlers moving from the .5-L to 16-oz. PET because of the slight savings in product volume.

Ryder sees success in the single-service size PET because of improved productivity of pre-form systems, which can now turn out 48 .5-L preforms per cycle, and high speed machines that can turn out as many as 15,000 bottles per hour.

The need still exists to improve the barrier properties for the single-service size PET. Ryder says not one barrier-coated soft drink bottle is commercially available today, but that should eventually change. Stupay reports the 3-L has already carved out a small, but independent market in the soft drink industry, but, as of yet, has not begun to impinge on 2-L sales. He predicts the 3-L will snare 15%-20% of the large package market.

Harris believes the 3-L has already begun to cannibalize the 2-L. "The majority of the sales in the family size packaging now is the 2-L PET, so that's where the 3-L will cannibalize most of its sales," he says.

But Harris does not believe that really matters. Bottlers would rather have a consumer pick up a 3-L than a 2-L since that represents an extra liter of soft drink that's being sold, he reasons.

In addition, 4-L and 5-L PET packages could be in the market before long.

Stupay doesn't envision the plastic can being a factor until the 1990s due to slow production speeds and the necessity of off-line quality control checking. Ryder is more optimistic; he says the can has the advantage of having less cost escalation than aluminum and offers a high-tech image.

"I think you'll see it some

As Brik Pak Inc. we introduced flexible aseptic packaging to America in 1981. In three short years, nearly 2½ billion of our flexible aseptic packages have been produced and sold to consumers across the country.

All along, we have been part of the worldwide Tetra Pak Group of Companies. In 1984, Tetra Pak produced about 34 billion cartons of juice, milk and liquid food products in 90 countries.

Our new name reflects the role we play as a member of The Tetra Pak Group. We haven't changed who we are, nor our commitment to provide the kind of technology and know-how that's made us America's leader in aseptic packaging.

TETRA PAK

Tetra Pak Inc. P.O. Box 802605, Dallas, Texas 75380-2605

where in the market this year," says Ryder.

Harris envisions a potential recycling problem with the can, particularly if the package is coated to improve product shelf life.

Increasingly, recycling has also become an important factor in PET. According to Harris, 100 million pounds, or about 19%, of the total PET production of 535 million pounds was recycled in 1984.

The success of cans and PET in 1984 combined to squeeze the glass industry. "The movement toward reducing the proclivity of packaging at food stores hurt glass. As plastic grows, that space is being taken from one-way bottles," says Stupay.

One industry spokeman says glass is getting squeezed out of the retail segment because it's not in the bottler's normal promotional cycle. "72% of our package was sold as a cold bottle package," he says.

Thanks to that, though, GPI reports continued success with the pre-labeled single-service container, which was up 8.5% over '83.

According to a spokesman at Owens-Illinois, the single service 8-10-oz. size for juices has done well in '85 along with beer in glass. "Beer production is up for the first quarter for glass," he says.

"Largely on the strength of significantly more efficient and productive glass container operations in the U.S. and around the world, the Glass Container Div. increased its earnings by 30% in 1984," he says.

Overall, returnables have held up pretty well in the South and the Midwest, where they are double the share that they are in the rest of the country, according to Stupay.

Despite this good news, there's no getting around the fact that glass is having its troubles. Says one spokesman, the problem is that suppliers don't have the profit margins to support a program of the magnitude to effect a change.

Beer

1984 was a poor year for the beer industry and it was reflected in a poor year for beer packaging — except, that is, for cans, up 3.8%.

"The success of cans in beer attests to the importance of the aluminum can in mandatory deposit states," says Stupay. Cans have grown to nearly a 70% share of beer packaging.

"Bottles have lost out in mandatory deposit states," he adds. "Returnables are basically a collector's item and seem to hold their own only in smaller restaurants and take-outs."

In addition, a lot of beer is purchased in 12-can packs, says an industry source.

Inroads have been made by plastic in wine and liquor, but change has been slow.

In wine, plastic has come in the 3-L and 4-L sizes as a matter of convenience because it is so much easier for the consumer to handle. In liquor, the shift has come in the small single-service sizes like those used by the airlines.

Stupay believes the consumer is getting more conditioned to plastic. Previously, consumers saw metal everywhere they looked, and that made metal an attractive material for their beverage containers. Today, the same can be said for plastic.

"It's everywhere — in your car, in your computer hardware — why not for your beverages. The change of liquor and wine too from glass to plastic is an evolutionary process, albeit a slow one, yet it is still occurring."

Sewell Plastics introduced a 1-L stock liquor bottle last year that is now being used by McCormick Distillers.

"We expect 1985 to be an excellent year to move that forward because some of the major names have gotten further into plastic," says Chuck Minarik, vp-marketing for Sewell.

Increased usage of PET and expansion into new markets has increaed demand for resin. Last fall, Eastman Chemical announced it had begun a 200 million pound per year expansion of its Columbia, SC, bottle polymer production facility. The expansion is expectd to be completed late in 1986, bringing the company's capacity for bottle polymer production to some 600 million pounds per year.

While exceptions exist, new packaging innovations did not

BEER SALES BY PACKAGE

(Units: Billions Equivalent 12 oz.)

	1983	1984	1985P
Total beer demand	58.7	58.0	59.3
Packaged beer	51.0	50.4	51.5
% Packaged	86.9	86.9	86.9
Cans	33.1	34.4	36.0
% Cans	64.9	68.3	69.9
One-way glass	14.1	12.4	11.8
% One-way	27.6	24.6	22.9
Returnable glass	3.8	3.6	3.7
% Returnable	6.2	7.1	7.2

Source: Arthur M. Stupay Prescott, Ball and Turben

Copyright: **Beverage Industry** April 1985

SOFT DRINK SALES BY PACKAGE

(Units: Billions Equivalent 12 oz.)

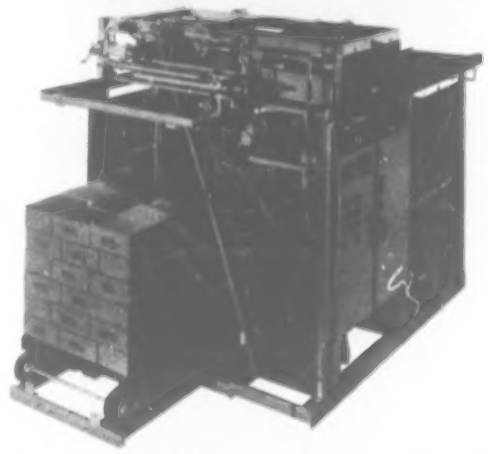
	1983	1984	1985P
Total SD demand	102.6	108.0	113.1
Packaged soft drinks	78.3	82.0	85.5
% Packaged	76.4	76.0	75.6
Cans	28.3	31.3	33.5
% Cans	36.1	38.2	39.2
One-way glass	12.4	12.5	12.5
% One-way	15.8	15.2	14.6
Returnable glass	19.6	18.7	18.2
% Returnable glass	25.1	22.8	21.3
Plastic	18.0	19.5	21.3
% Plastic	23.0	23.8	24.9

Source: Arthur M. Stupay Prescott, Ball and Turben

Copyright: **Beverage Industry** April 1985

Reynolds Metals has put a finger hole on its stay-on-tabs which saves on aluminum and makes opening easier for consumers.

PLEASING TO THE PALLET.



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proliferate in 1984.

Perhaps the most significant new package is the 3-L PET. Buffalo Rock Bottling Co., the Pepsi bottler in Birmingham, AL, became the first in the market with the package. The bottle, which holds 101.4-ozs., is produced in the local Owens-Illinois PET plant and utilizes a 38-mm Alcoa RO closure. The bottle is 1-in. taller than the 2-L bottle and about a half-inch bigger in diameter. Coke followed Pepsi in the Mobile, AL, market.

Sewell claims it was the first to produce the 3-L PET bottle, which was introduced at 80 grams. Minarik says the package has now been reduced to 74 grams through an ongoing lightweighting program.

"No question, the traditional package of today won't be the package of the future."
—Arthur Stupay market analyst

The Atlanta, GA-based firm opened a plant in Leominster, MA, last year that is producing 2-L and 16-oz. PET.

Sewell is corroborating with Petainer Development Corp., PLM and Metal Box on the plastic can venture, according to Minarik. "Not a whole lot can be said about the can. It's a full-scale development program. Sewell will be the manufacturing arm for the can in this country when it starts up later this year."

In the fall, Miller Brewing Co. began using a quart-size can supplied by Reynolds Metals, designed to compete with similar-size packages in glass. "The can is convenient for consumers and stays cold much longer than a similar glass container," Miller spokesman Steve Forsyth told **BI** when it was first introduced.

To date, Miller is the only brewer using the quart-size can, marketed as the "King Kan."

Reynolds also introduced Trim/Line 200 aluminum cans, billed as "the first aluminum can that can be custom-tailored to meet your specific product requirements."

Can sizes range from 188-ml to 250-ml with a choice of varying ends. Miller is also looking at this range of smaller size cans, according to a Reynolds spokesperson, with the thought of marketing the package toward women.

Reynolds has punched out a hole on the stay-on-tabs, which the company says will save aluminum and make beverage cans easier to open.

The American Can Co. placed a lot of emphasis on light-weighting in 1984. "Prices were moderated via lightweighting," according to David R. Wiesley, vp-beverage marketing. *(See related story, page 62.)*

Other developments included continued emphasis on 12-can packs and promotional programs, such as under-the-tab promotions.

Ball Metal Container's spin neck can is "progressing very well," according to David B. Sheldon, vp-marketing. Plants in Colorado, California, Ohio and New York are producing the can, which uses a 206 end.

"We've placed a lot of emphasis on getting soft drink people into the spin neck. The beer people have been slower to change over.

"If you look at the major brewers, they have a major logistics problem. It's not as easy for them to change over as it is a one-filler soft drink operator. The brewers are a little more cautious," he says.

Likewise, packaging developments in the beer industry were not as prevalent. "Brewers are more concerned with survival than growth and package innovation," says Stupay.

An import, Kirin Beer, introduced a plastic 2-L mini-keg through its marketing arm here, Kirin U.S.A., last summer.

The mini-keg is a double-lined, lightweight, shatterproof plastic. Yoshino Kogyosho Ltd. of Japan is manufacturing the kegs through a bi-axial oriented blowmolding process.

1985 should bring more changes. "No question, the traditional package of today won't be the package of the future," says Stupay.

"Why should plastics copy the aluminum can? Once the capabilities are realized, it will be redesigned. Why not have bags with straws that can fit in your pocket? Is 12-oz. the ideal size? Need this be refilled at a beverage plant or could it be done through a vending machine?"

Stupay poses more questions than answers with his observations, but so does the future of beverage packaging. □

Calendar of events

April 1-3: Primepack, New York Coliseum

April 6-14: View Australia '85, International Wine, Spirit and Beer Conference, Melbourne, Australia

April 14-17: DFISA 66th Annual Conference, Marco Island, FL, Marriott

April 22-24: Brewers & Beverages Pkg. Assn. (BBPA), New York, NY

April 22-24: Aseptipak '85, Third International Conference and Exhibition, Princeton, NJ

April 29-May 1: Society of Soft Drink Technologists, Hollywood, Fl, Diplomat Hotel

April 30-May 4: California Beer Wholesaler Assn., Anaheim, CA

May 1-3: Private Truck Council of America Inc, 46th Annual Meeting, Chicago, IL, Chicago Marriott

May 3-10: Interbrau, Munich, Germany

May 5-7: CSDA Annual Conference, Vancouver, B.C., Bayshore Inn

May 5-7: NSDA Washington/Oregon Convention, Bellevue, WA, Red Lion Inn

May 5-7: NSDA New England States Convention, Newport, RI, Sheraton Islander Inn

May 7-9: NSDA Ohio Convention, Columbus, OH, Hyatt on Capital Square

May 12-14: NSDA West Virgina Convention, White Sulphur Springs, WV, The Greenbrier

May 12-15: NWDA 1st Annual National Wine Distribution Conference, Dallas, TX, Fairmont Hotel

May 14-15: NSDA Illinois Convention, Chicago, IL, Westin

May 16-17: Packaging Innovations in Europe and Japan, Philadelphia, PA, Airport Marriott

May 17-22: NSDA Kentucky Convention, Hilton Head, SC, Mariner's Inn

May 19-20: NSDA Florida Convention, Wesley Chapel, FL, Saddlebrook Resort

May 22: DFISA's one-day workshop on "Export Marketing," Arlington, VA, Key Bridge Marriott

May 22-23: Southeastern Packaging and Handling Meeting, Atlanta, GA

May 23: DFISA Marketing Communications Workshop, Arlington, VA, Key Bridge Marriott

May 24: DFISA International Trade Seminar, Arlington, VA, Key Bridge Marriott

June 9-12: Institute of Food Technology, Atlanta, GA □

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Paper, plastic battling it out in '85

(Continued from page 4)

more into a single bottle business and as a result the number of these containers sold loose increased to 13% in 1984. Industry sources tell **BI** that the rack placement programs in convenience stores which the industry launched in '83 and continued in '84 have influenced this packaging shift.

In beer, there was very little change in secondary packaging. The industry continues to promote 12-pack cans and this resulted in a upward swing of paperboard's share to 39.8%.

Film

To date, activity in film packaging has been fairly limited to the Baltimore-Washington corridor where Allegheny Pepsi introduced it slightly over a year and a half ago.

And just recently Mid-Atlantic Coke entered that same market place with the packages. A major West Coast soft drink firm is also expected to go with the package in the near future.

Everyone's looking at the Allegheny numbers which show its products up considerably over competition. Mid-Atlantic's move into the process more or less confirms the consumer attraction.

Buyers have two alternative equipment choices: Mead's TriFi System and Kister's shrink system sold in the U.S. by Simplimatic Engineering.

Kister's packaging equipment is used by Allegheny and Mead's by Mid-Atlantic.

Mead supplies the film for its units. Simplimatic has a co-operative deal with Engraph's Packaged Products Div., which provides film for the Allegheny installation.

Interest in film systems is there in the soft drink industry. Earlier this year when **BI** surveyed a panel of purchasers of secondary packaging equipment, more than 75% of the respondents indicated they intended to investigate this method of packaging in 1985. The big attraction in all cases was cost.

Paperboard/corrugated

Although corrugated has lost all of its charm in the soft drink secondary packaging area and is losing market share in beer, the industry — users and suppliers — alike are not going to give ground willingly.

Part of the problem has been the lack of a full range of graphic possibilities. Now in development is a method of preprinting the outside liner before it is applied in the corrugator.

If this is successful, manufacturers feel they will have defused a major paperboard advantage.

Paperboard manufacturers, however, are not sleeping. A marketing executive at one of the firms recently commented off-the-record, "If you think 12-packs are big, just wait till one of the big brewers gets into a 24-pack."

The suppliers are ready for it. Some of the wrapping equipment now available to users can be converted from 12s to 24s in less than an hour.

Paperboard suppliers have also changed the density of the board they are now offering. By reducing the number of fibers and "fluffing up" what remains the new board has caliper as before, but less weight and more strength.

One result of these changes is that the industry's new 12-packs for NRs are going down from 27 pt. to 24 pt.

Handle designs for wraps and carriers are also changing. A new 24-pack to be introduced shortly — in an 18 pt. board version — features a patented slotted hand holder that provides additional strength, making the reduction from an 18 pt. to 21 pt. carrier possible.

Tertiary

In soft drinks, the trend to returnable cases for nonreturnable packaging is continuing. **BI** estimates that the amount of 2-L PET going to market in plastic cases increased between 15%-20% in 1984 and as the cost saving of this move begins to move through the grapevine, this trend will still continue.

Models are currently available which can handle the 3-L package and suppliers confirm they'll be offering more in the near future.

Corrugated trays, used by both brewers and soft drink producers, could change slightly as suppliers foresee a desire for an all white generic tray which could be used as a more attractive merchandiser.

Rule 41, which details common carrier and railroad specifications, preclude very many changes in this package in the future.

Brewers are continuing to hang in there with fiberboard shippers for returnables, but these too are coming under scrutiny.

Demand is growing that these fiberboard shippers be coated with substances which make it possible for them to be clean on their return to the brewery. □

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TAMPA BATTLEGROUND PAGE 30

Beverage Industry

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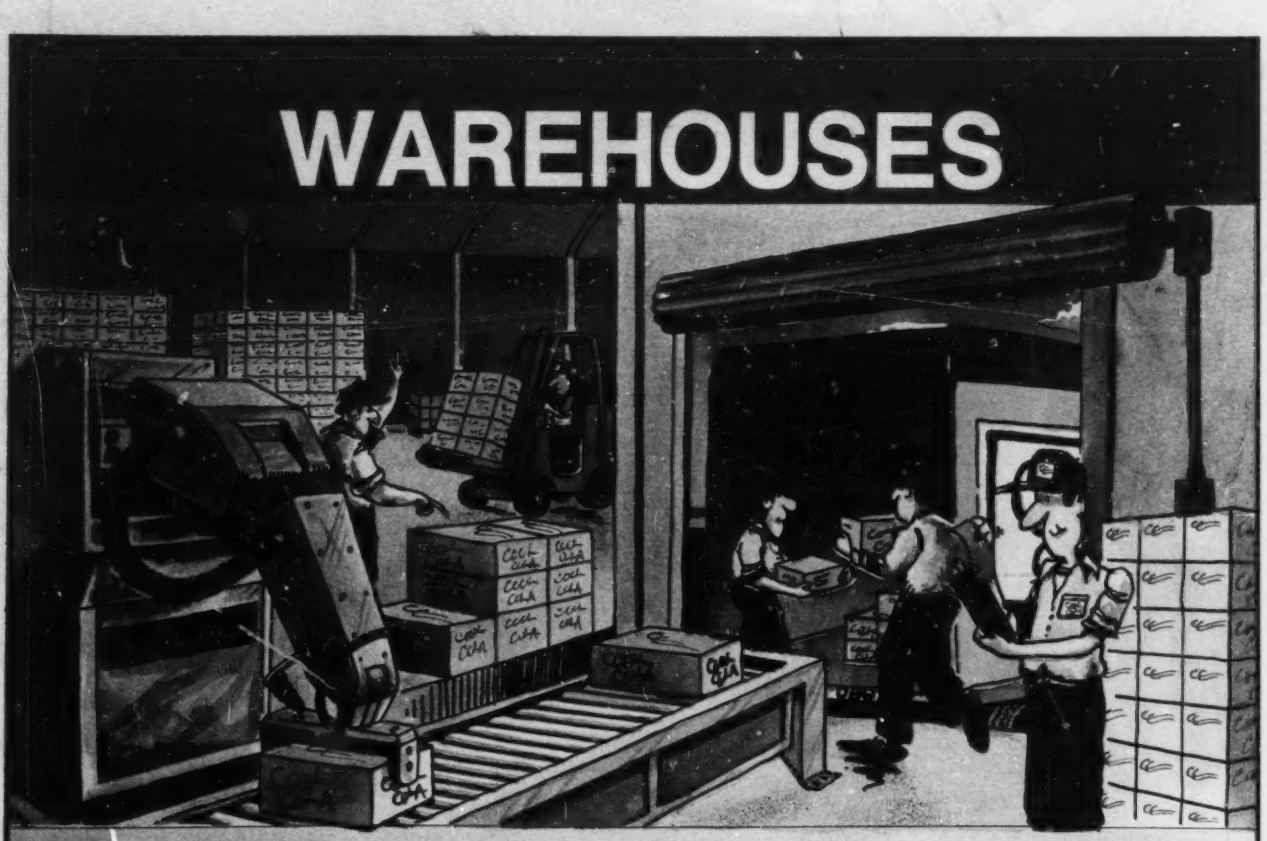

Entering the age of automation

SPECIAL REPORT—Cases of product slide mysteriously along ceiling-high metal racks. Robot-like figures make their way down narrow aisles; cases flow magically into their waiting arms. The robots discharge their loads onto moving conveyors that shuttle the product onto waiting trucks.

This scenario illustrates the outermost reaches that automation can grasp in the beverage distribution outlet.

Of course this world of mechanical figures and conveyors won't replace the beverage warehouse as we know it.

But the stage is being set for such a possibility, where warehouses can become highly polished, automated oper

(Continued on page 16)

Bottlers to battle teen DWI

WASHINGTON, DC—The National Soft Drink Assn. is sending kits to bottlers on a new community affairs program to help reduce teen drunk driving.

The NSDA is joining hands with four other national organizations that "represent businesses with community ties" in sponsoring "Operation Prom/Graduation."

In a letter included in a promotional kit for the campaign, Frederick L. Webber, executive-vp, NSDA, said, "Operation Prom/Graduation is an investment in our young people. It offers concerned members of the business community an opportunity to meet high school seniors on their own turf, to show them we care about their futures."

(Continued on page 17)

BI Report

■ COKE attempting to stop market share erosion of flagship brand with new reformulation. Brand Coke now has "smoother" taste. Translated by observers at press conference: slightly sweeter. New taste Coke available in most U.S. cities by May 8, accompanied by new packaging and ad campaign.

■ FRESCA also reformulated by Coke as a low-calorie alternative containing 1% grapefruit juice and 100% NutraSweet as a sweetener base. Positioned as "the perfect soft drink" in the first major advertising for the brand in years, new Fresca expected to battle waters and wine coolers.

(Continued on page 60)

Pollution bringing health, legal risks

by Marty Westerman
Contributing Editor

SPECIAL REPORT—When a Minnesota bottler tested his water, the levels of organic halides and THMs were too high. He traced the pollutants to two local factories.

These factories were dumping waste products that the municipal supply was picking up. His livelihood at stake, there was nothing to do but join in action against the polluters.

During the Florida EDB and California's Silicon Valley well pollution problems, both states' bottlers were spared problems.

When state health authorities demanded that one Pennsylvania bottler pass all plant water through a one-micron filter rather than superchlorinating during the state's giardia outbreak last winter, he turned to his franchise company. In an intense poll of state authorities, parent company researchers found no consensus that superchlorination wouldn't work, and averted this expensive move. The area of doubt also precipitated the current NSDA giardia

(Continued on page 12)

BI Today

THE DIFFERENCE IS EVIDENT

G. Heileman Brewing Co. is the first brewer to use tamper-evident closures on single-service, 12-oz. bottles. See page 40.

Sugar import bill could hike prices

WASHINGTON, D.C.—A proposal to allow unlimited imports of raw sugar could cost U.S. corn and sugar growers some $2 billion and significantly reduce the availability of High Fructose Corn Sweeteners.

According to a study released by Corn Refiners Association, Inc., Savannah Foods and Industries, a major importer and refiner of foreign raw sugar, has asked the administration to allow quota-free importation of raw sugar to be used in the production of invert sugar, a liquid sweetener that is basically dissolved sugar. Currently, imports of foreign sugar are limited to 2.7 million tons.

The report goes on to say that soft-drink producers would realize an immediate cost benefit of over $600 million compared to the cost of the HFCS now being used by virtually all major soft-drink firms.

Opponents of the measure, however, warn against premature celebration. Kyd Brenner, a spokesman for Corn Refiners Association,

(Continued on page 42)

Features

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This month's exclusive survey reveals buying patterns and preferences for fork lift trucks, and what suppliers can do to meet their demands.

18 **Better late than never**
NSDA's 1983 soft drink sales figures show the first rumblings of sales trends that are in full swing today

23 **In-store promotions pay off**
Merchandising is gaining significance as bottlers realize the value of getting their product off the supermarket shelves and into the spotlight.

25 **A-B explores options**
Given the projections for slow industry growth, A-B is extending its product line by expanding distribution of its recently-tested malt liquor.

30 **Battleground: Tampa**
BI's continuing series explores the warm Tampa climate, where beer wars dominate the beverage scene.

47 **How to buy a beverage plant**
Kline investment survey pinpoints how to tell which beverage operations can become veritable gold mines of profits for the smart investor.

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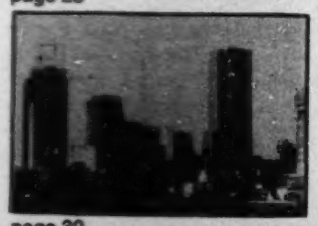
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Soundoff

On 3-L pricing

"We felt that the 3-L should be the best price per ounce, but not on an absurd lower basis. It should be a better buy than the 2-L, naturally, but it shouldn't be priced ridiculously low. For instance, let's use the illustration of say that maybe the per ounce cost of the bottle is ½ more than the 2-L, but gives them half more in ounces. So that gives them a reasonably good buy for the new package. You will find where there is a reasonable difference, that the housewife will catch on and move into the 3-L. From the beginning, we wanted a better margin for the stores, for the bottler, and also, hopefully, for the bottle manufacturer who claims that the 2-L package is not all that profitable to them."

James C. Lee Jr.
Chairman of the board and CEO
Buffalo Rock Co., Birmingham, AL
speaking at Ryder Conference '85

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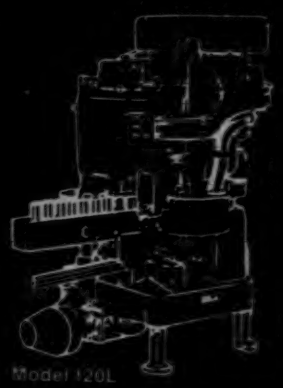
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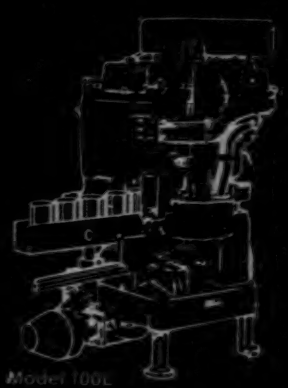
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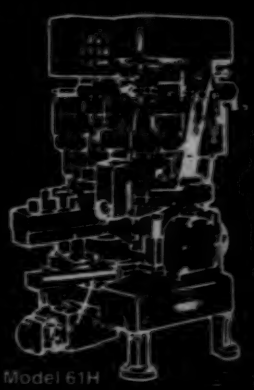
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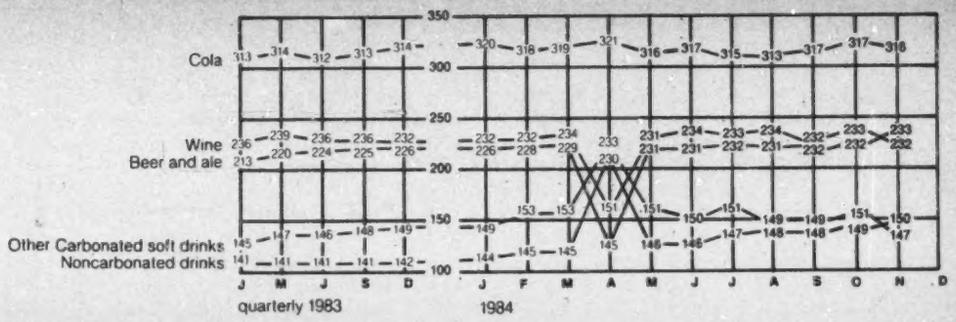
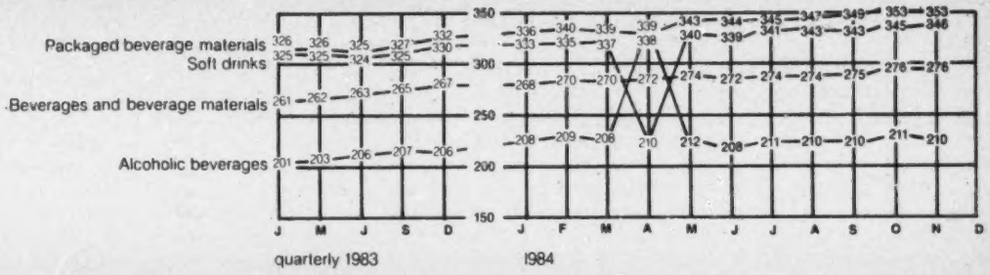
Beverage Business Indicators*

1984 CONSUMER PRICE INDEX (1967 = 100)

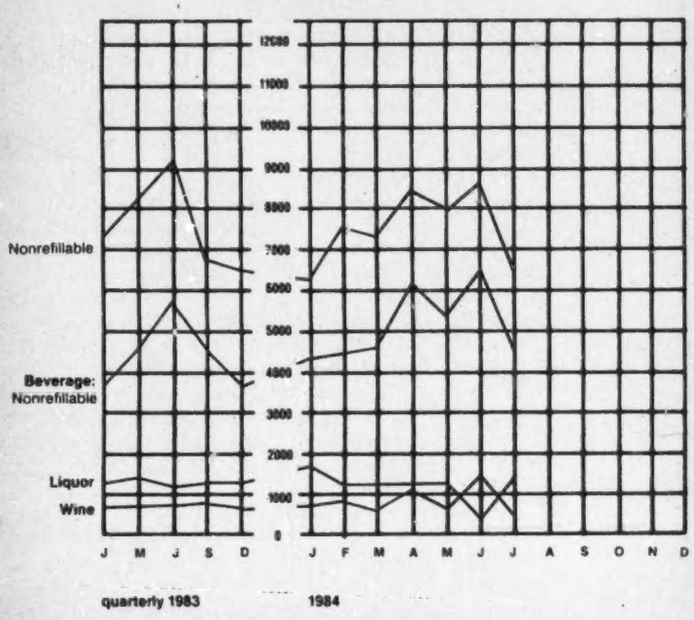


1984 PRODUCER PRICE INDEX (1967 = 100)



BOTTLE SHIPMENTS

(thousands of gross)



IMPORTED BEVERAGES

(proof gals)

	Oct. 1984	Nov. 1984	% Change	Nov. 1983	Nov. '83 vs. Nov. '84 % Change
Beer*	18,850,576	16,577,348	−12.1%	16,133,442	2.8%
Whiskey	6,944,850	9,381,434	35.1%	7,331,946	28.0%
Brandy	657,735	776,279	18.0%	710,761	9.2%
Gin	605,329	739,253	22.1%	703,016	5.2%
Rum	140,788	61,065	−56.6%	121,034	−49.5%
Cordials & liqueurs	856,792	1,257,405	46.8%	1,105,988	13.7%
Others	975,613	966,867	−0.9%	993,696	−2.7%
Total	29,031,683	29,759,651	2.5%	27,099,883	9.8%
Sparkling wines	1,530,961	1,966,622	28.5%	1,482,361	32.7%
Still wines, table	9,350,570	12,185,061	30.3%	10,441,302	16.7%
Still wines, fortified	380,022	378,533	−0.4%	361,402	4.7%
Vermouth	264,917	331,152	25.0%	291,737	13.5%

*Includes ale, stout, porter
Source: National Association of Beverage Importers

ALCOHOLIC BEVERAGE REMOVALS

(barrels of 31 gals)

	Sept. 1984	Oct. 1984	% Change	Oct. 1983	Oct. '83 vs. Oct. '84 % Change
Beer	13,842,430	14,556,012	5.2%	13,769,109	5.7%
Wine*	29,784,891	36,374,378	22.1%	38,873,152	−6.4%
Spirits*	26,971,337	34,073,378	26.3%	36,951,649	−7.8%

*wine gals
Source: U.S. Department of the Treasury Bureau of Alcohol, Tobacco and Firearms

CLOSURES FOR BEVERAGES

(thousands of gross)

	Aug. 1984	Sept. 1984	% Change	Sept. 1983	Sept. '83 vs. Sept. '84 % Change
Metal (for spirits, wines)*	80,048	66,375	−17.1%	63,752	4.1%
Plastic (for spirits, wines)*	112,163	111,633	−0.5%	140,528	−20.6%
Metal Crowns (beer & soft drinks)	14,712	13,068	−11.2%	14,203	−8.0%
Soft drink (convenience and conventional)	5,115	4,877	−4.7%	6,189	−21.2%
Beer (convenience and conventional)	9,597	8,191	−14.7%	8,014	2.2%
All other metal closures other than crowns	8,392	7,118	−15.2%	8,287	−14.1%

*thousands of units
Source: U.S. Department of Commerce Bureau of the Census

Firms seek durable, safe and easy to maintain fork lift trucks

Special Report—Durability and safety are major factors in the warehouse where fork lift trucks shift anywhere from 3,000-lb. to 5,000-lb. loads.

Operator safety and equipment durability are major concerns for beverage producers when purchasing fork lifts, **Beverage Industry** has learned from an exclusive survey of beverage producers. Of those who responded, 77.6% feel that operator's safety is a major concern, and 79.2% feel that the durability of the unit is important.

The Hyster Co. of Danville, IL, has seen a lot of interest in human engineering, according to Lou Sponseller, advertising and sales promotion manager.

"It's important for operation to be maintained at a high, steady pace," Sponseller explains, "and so how the operator moves and his comfort become very important."

Most suppliers feel that 1984 was a fairly strong year for sales mainly because of the rebound in the economy, and many expect it to continue into 1985.

The average respondent, however, claims to have bought only two new fork lift trucks during the year. In fact most, 68.1%, indicated that the purchases made in '84 were the same as those made previous years. Only 19.2% indicated that it was an increase, and 12.7% decreased the number of their purchases.

The electric powered fork lift came into its own about ten years ago, mainly due to environmental standards according to Lou Sponseller. **BI's** survey indicates that 26.7% have decided to change from one power type to another, typically from propane to electric powered fork lifts.

Some of the reasons given were that electric is more cost effective, cleaner, emits less fumes, is quieter and more reliable. None of those who replied intend to switch from electric to propane, although a few answered that they may switch from gas to propane powered.

Most suppliers say sales are split just about fifty-fifty: half of the units sold are electric, the other some type of internal combustion powered engine such as gas, diesel or lp gas (propane).

What's needed

When asked what features or advances the user would like to see in the near future, many answered that they needed easy access to parts for self maintenance, and that parts should be more available.

One respondent wrote: "I have not seen a forklift that is at least six months old that did not leak some kind of oil." Many agreed that a better seal is needed for the entire oil system.

A major concern voiced is that on electric powered units, the batteries don't remain charged long enough. One individual said he would like to see "improved batteries to increase running time and minimize battery changes, and a better structure mast assembly to allow better visibility."

Other concerns include a better service life on the mast, improved controls on the electric powered trucks, and better noise control.

Driver comfort was also noted with improved seat quality in the form of shock absorbing seats requested by a number of individuals. A few wrote that a damage proof, lightweight load back rest would be an excellent optional feature.

Many cite the need for some additional standard features. Their suggestions include rearview mirrors, nonmarking tires, and warning lights including flood lights and low fuel warning lights as standard equipment.

Almost all mentioned the importance of human engineering and a concern with improving driver safety and efficiency.

Truck activity

The warehouse is the major center of fork lift truck activity with 97.4% using the trucks there. Truck loading accounts for 94.8% of truck lift use and 68.8% is dock work. Others include towing, maintenance and production.

The heavy use of forklifts within the warehouse demands a truck that can maneuver around tight corners and operate smoothly in all directions.

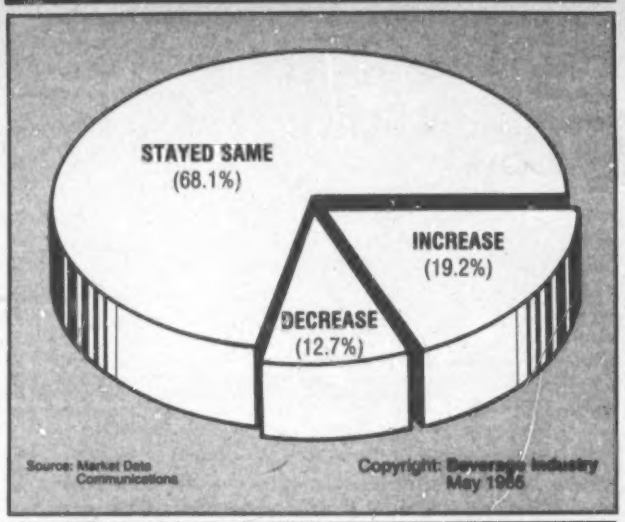
Two companies, Allis-Chalmers Co. and Hyster Co. agree that maneuverability of the truck is important, and tied in with that is how easily the operator can handle the equipment.

The Allis-Chalmers Co. of Milwaukee, targets those buyers concerns that pertain to maximizing the visibility for the driver, according to Steve Lovelady, merchandising manager.

"High visibility for the driver is a must," asserts Lovelady. "Maneuverability is important but must go along with safety. In addition, we pay attention to the quality of the truck, which ties in to the overall operating costs."

Sponseller agrees quality in virtually all areas is essential. "It's best if the truck is running steadily, and downtime is kept at a minimum. That's where a good, strong dealer organization is very important." □

IS THE NUMBER OF FORK LIFT TRUCKS YOU PURCHASED IN 1984 AN INCREASE OR DECREASE OVER PREVIOUS YEARS?



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Report explores South East Asian soft drink markets

London—A major report on the South East Asian soft drink markets has been released by London-based marketing consultants International Marketing & Economic Services.

"Soft Drinks 85—Asian" covers soft drink consumption and distribution in Singapore, Malaysia, Indonesia, Thailand and the Philippines in five volumes.

According to the report, Coke and Pepsi are in hot competition for the top spot in the South East Asia market, while growing regional companies are striving for independence through non-cola flavors or expansion into still soft drinks.

Fraser & Neave and Yeo Hiap Seng currently lead as the two main regional independents there.

Emergence of Tetra Brik packages over the past decade has cut into the established carbonated market with a wide range of fruit drinks.

The report delves into the growth of non-carbonated soft drinks, the importance of regional products and flavors, the gradual decline of on-premise trade and the steady shift away from traditional returnable glass bottles.

To obtain a copy of the report, contact IMES (UK) Ltd., Hurst House, 157/169 Walton Rd., East Molesey, Surrey KT8 0DX, England. □

NSDA survey discovers start of growth trends

Special Report—The 1983 soft drink market increased by a rate substantially higher than previous years, 5.1%, kicking off the growth spurt enjoyed in 1984 and still being felt today, according to National Soft Drink Assn.'s recently released sales survey.

Also beginning to be seen in 1983 was the trend toward emphasis on bulk sales, with that category showing a 9.4% gain for a 4% share gain and 23.6% of the market. Packaged sales were displaced by about a 1.2% market share.

NSDA's survey, more extensive than ever, includes statistics on the decaffeinated market and employment figures. It was compiled from figures supplied by 292 respondents.

Total sales represented 4,274,274,000 cases of standardized units (288 oz.). Total dollar value increased by 7.1%.

Average container size increased 2% from 16.54 oz. per package unit in 1982 to 16.87 oz. in '83.

The number of containers filled increased by 1.84%.

NSDA's survey estimates the industry filled 55.73 billion individual units in 1983 with 42.34 billion being non-refillable containers.

A breakdown of packaged sales shows cans snaring 53% of the market. Plastic took 6.75%, refillable 24% and non-returnable glass had 16.2%.

In refillable, 69 oz. was 3.2%; 10-12 oz., 13%; 16/.5-L, 75.6%; and 24-32 oz., 8.2%.

In non-returnable glass, 16 oz./.5-L accounted for 66.7% of sales, followed by 10-12 oz. with 27.9%.

In plastic, 2-L outpaced other containers with 85.6% of the market. Half-liters claimed 6.87% and 1-L took 7.52%. In terms of growth, however, 1-L outpaced the other, marking an increase of 37.1% for the year, with 2-L showing 19.5% growth.

Plastic overall showed the largest increase at 19.6%. Cans also jumped 7.3%, but glass, both refillable and one-way, continued their downward slide by 8.4% and 4.9% respectively.

Aluminum took 94.59% of the can market; bi-metal claimed the remaining 5.41%.

Over the same period, the beverage industry experienced a somewhat modest .96% increase in the employment picture.

The West Central region experienced a 2.2% decline in employment figures while the Southwestern region's employment statistics dropped by 1.5%.

However, all other regions in the soft drink industry experienced employment increases, slightly offsetting the declines.

Figures varied from the Western area's 7.4% increase to Southern .6% climb.

The volume of soft drinks sold per employee increased 5%. Sales dollars per employee grew at a 5.6% rate.

The survey estimates that wholesale prices for soft drinks increased by 1.9% while the Consumer Price Index as a whole increased by 3.2%

Soft drink sales and consumption increased in 1983 at rates substantially higher than those experienced by the industry in 1982.

Flavors

In flavored soft drinks, regular beverages held 80.2% of the market with diet at 19.1% and club soda/seltzer at .7%.

Colas led the way in the regular market with a 47.5% share. Lemon lime held 9.6% and pepper types took 5.3% of the market.

Decaffeinated drinks accounted for 4.1% of the regular soft drink market and 3.3% of diet sales.

Club sodas and seltzers, presented for the first time as a separate category, weighed in at only .7% of the market. According to 1984 estimates, the entire category is by about 60% this year.

Changes in regular versus diet soft drinks from 1982 to 1983 shows regular increased 2.6% in packaged and 10% in bulk sales. Regulars had a total market increase of 4.9%.

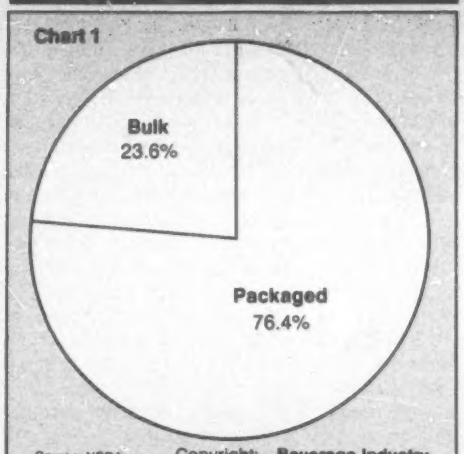
Packaged sales of diet drinks increased 13.6% with bulk going up 24.2%. Diet sales increased a total of 14%, the study notes.

Supermarkets had the biggest chunk of home market sales at 43.6% for packaged sales. Grocery stores sold 12.1% of packaged beverages, drug/convenience stores moved 13.5%.

The NSDA survey, based on typical responses, estimates a volume growth of 16.2%, sales dollar growth of 6.5% and employment growth of 2.1% in the industry in 1983 over 1982. □

Volume By Market Share

Chart 1



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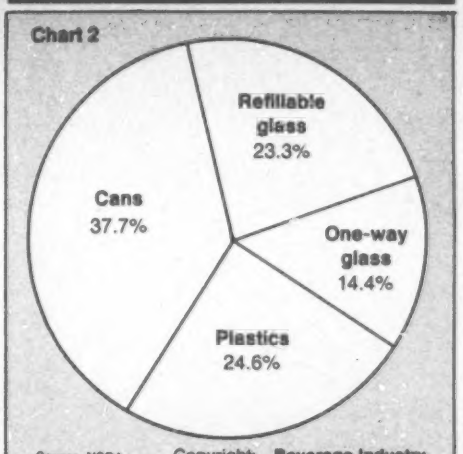
Packaging By Type

Chart 2



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Study delay explained

NSDA's annual sales survey for 1983 came out a little late, due mostly to it being more comprehensive than ever.

"First we upped the coverage by 50%," says Jim Abert, vp-economics and research. "Secondly, we had a sales by state analysis."

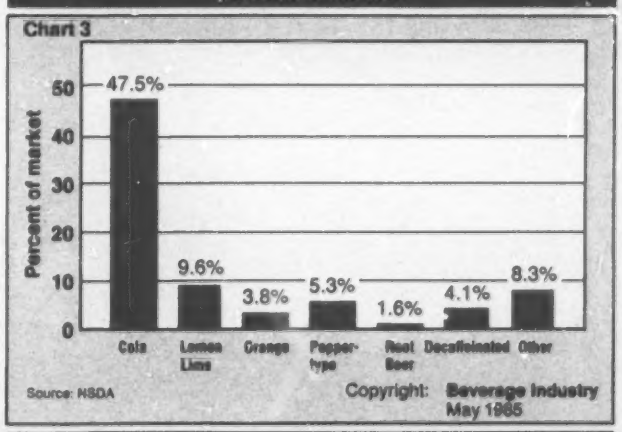
Installation of a computer system for NSDA to analyze all the results also took more time than anticipated.

The association assures that the 1984 forms are out, and they should be back on schedule by this summer. □

Flavored Soft Drinks

percent of market

Chart 3



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